



NoRTEC Strategic Planning Document

Executive Summary

SWOT Analysis

Strengths:

- Strong Leadership
- Strong Collaboration/Cooperation/Innovation
- Cohesive Strategy Approach
- Breadth of Experience
- Adaptability/Perseverance
- Strong Similarities/Priorities
- Rural Focus
- Cost Efficient with Proven Success
- Diverse and Engaged Board

Weaknesses:

- Technology Adoption
- Weakness in Branding/Awareness
- Lack of Board Representation across key areas/sectors
- Not forward looking enough...forecasting
- Lack of clarity about what we do and can accomplish.
- Missed community engagement opportunities due to staffing shortages.
- Staff Turnover/Retention.... the cost of attrition
- Insufficient upfront training
- Insufficient engagement of board in strategic matters & problem solving
- Insufficient resources to maximize funding opportunities.
- Limited apprenticeship training centers and apprenticeship openings.

Opportunities:

- Stronger Client Engagement
- Board Representation from our Client Base
- Organization strategy & design: Increasing opportunities to increase impact and efficiencies.
- Deepen engagement with economic development organizations helping them help us.
- Increase focus on small business development, self-employment, and the Gig economy.
- Help small business grow and evolve...more jobs, new training, new career paths.
- Stronger relationship with potential partners (Labor Organizations, CSAC, RCRC)



Threats:

- Competition for similar funds.
- Available funding does not meet the total demand for services.
- Sporadic services due to funding limitations and restrictions impacts credibility & confidence.
- Increasing complexity of managing grant funding leading to more staff time.
- Trend towards remote workers tapping the traditional labor force.
- Lack of confidence in Workforce Organizations.
- Funding leaning toward Community Based Organizations due to less restrictions. (Seen as nimble and more flexible)
- Lack of community awareness of what we do.

Key Objectives

Services Delivered – We are committed to providing high quality services that balances the needs of our clients with program-specific criteria. We understand that serving the needs of the rural communities is often more resource intensive and factor that into our service strategy.

- Total number of businesses served.
- Total number of participants served.
- Number of clients served per county.
- Quality of service ratings.

Next Steps to Achieve Services Delivered Objective:

1. *Assess what staff qualifications are most important for providing quality services.*
2. *Purchase or develop consistent, collaborative training that addresses these critical qualifications.*
3. *Deliver to all Career Center staff on a systematic, continuing basis.*
4. *Utilize staff feedback on training to improve future training.*
5. *Utilize customer feedback to assess the perceived quality of services delivered to assess the effectiveness of existing staff training and inform future training.*
6. *Explore ways in which evolving technology can increase our reach.*
7. *Track number of clients served with setting specific goals. Focus on service quality.*

Proposed Timeline: *Develop Curriculum for first All-Staff training to be delivered in Spring 2024. Develop systematic schedule for ongoing staff training – Summer 2024.*

Branding – We believe that building brand image, recognition, awareness, and value perception will support our efforts to better serve our communities. For example, co-branding, strategic marketing and business development that will compliment high quality service delivery and establish our organization as best-in-class throughout the North State and beyond!

- Go to source and subject matter experts in workforce development.
- Easy to do business with



Next Steps to Achieve Branding Objective:

1. *Solicit outside proposals, with preference for local consultants, to implement a unified name brand and tagline across our service area.*
2. *If available, secure funding to implement unified name, brand, and tagline.*
3. *If funding is not available for outside technical assistance, self-implement unified name, brand, and tagline.*

Proposed Timeline: Develop three possible unified names and brand to be presented to Boards for approval.

Funding – We understand that building a stable and diverse collection of funding sources is critical to our long-term success. We will pursue new revenue sources that are aligned with the unique needs of our client base focused on stability, diversity, and growth.

- 3–5-year funding forecasted revenues.
- Maintain or shift our alignments to remain relevant in response to changes affecting our clients and our organizations.

Next Steps to Achieve Funding Objective:

1. *Increase staff capacity to systematically pursue grant funds that fit with our mutual vision.*
2. *Attain consensus on which funding sources to pursue.*
3. *Identify grant opportunities through services, associations, and research.*
4. *Collaborate on proposed project design, target populations and parameters.*
5. *Develop regional impact report for decision makers and funders.*

*Proposed Timeline: Implement in current program year to be fully refined by June 30, 2024.
Develop regional impact report by June 30, 2025.*

Cultural Health – We believe that a healthy workplace culture is essential to our shared success. We are committed to building upon what is working well and to bravely addressing challenges that are holding us back.

- Engagement surveys
 - Team Members, Clients, Boards
 - Engagement, Respect, Collaboration, Focus, Alignment

Next Steps to Achieve Cultural Health Objective:

1. *We believe that the steps taken to address the other strategies will improve our unified cultural health.*



Partnership Development – We recognize the importance building deeper connections with a broader audience of partners in workforce development. We will identify and prioritize those partners who we believe will have the greatest impact and invest time and resource to build/nurture those relationships.

- Partner Endorsements & MOU's

Next Steps to Achieve Partnership Development Objective:

1. *Strategically work with partners who share our vision and are critical in helping us achieve that vision.*
2. *Explore opportunities to formalize relations with partners through MOU's and other formal arrangements.*
3. *Assign staff to individual partnerships avoid multiple contacts and to make sure contact is maintained with all partners.*
4. *Professional development of staff to foster successful partnerships.*

Proposed Timeline: *Implement in current program year to be fully refined by June 30, 2025.*

Rural County Advocacy – We see the rural counties are often at a disadvantage when it comes to funding and policies that support the unique needs of rural areas. We will collaborate with key influencers (organizations and individuals) to generate more rural-focused outcomes.

- Number of rural-friendly workforce programs
- Revenues to support rural-friendly workforce programs.
- Success rate in support for rural-focused programs/projects as prioritized by the board.

Next Steps to Achieve Rural County Advocacy Objective:

1. *Consistent messaging to outside funding agencies regarding the unique challenges and opportunities in rural areas.*
2. *Share information with National and State organizations regarding our success with our unique populations.*
3. *Staff training on increasing public recognition of organizational successes.*

Proposed Timeline: *Implement in next program year to be fully refined by June 30, 2025.*

Organizational Effectiveness – We embrace a continuous improvement mindset with a commitment to prioritizing our investment of time and resources for the greatest impact. Investing in our leadership team and team members is a critical component of our approach. We acknowledge the importance of improving efficiencies as we also strive to improve our overall effectiveness. Creating “Centers of Excellence” and leveraging a shared resources approach will play an important role in our success.

- Leadership/Team Rating of Organizations Commitment to Development
- Board Rating of Organizational Effectiveness



Next Steps to Achieve Organizational Effectiveness Objective:

- 1. Self-assessment of Board Effectiveness and ability to support key objectives.*
- 2. Develop organizational design plan/statement.*
- 3. Identify opportunities/roles for board to support organizational goals.*
- 4. Empower/train board for organizational advocacy.*
- 5. NoRTEC and Service Provider staff to conduct a thorough and systematic review of individual policies, procedures, and client experience to simplify and create consistency throughout our organizations.*

Proposed Timeline: Begin implementation during Program Year 2024/2025.